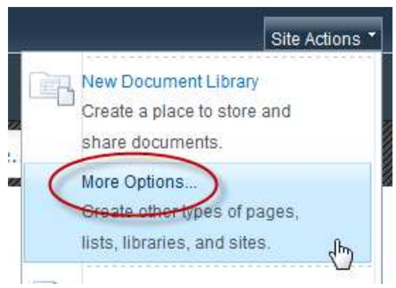
Creating a Project Timeline using the Chart Web Part (SharePoint 2010)

The purpose of this document is to provide step by step instructions on how to create a high level project timeline. This method utilizes a SharePoint Project Timeline list and Chart Web Part. The Chart Web part must be connected to the list to display the data properly. There are four steps:

1: Create Project Timeline List

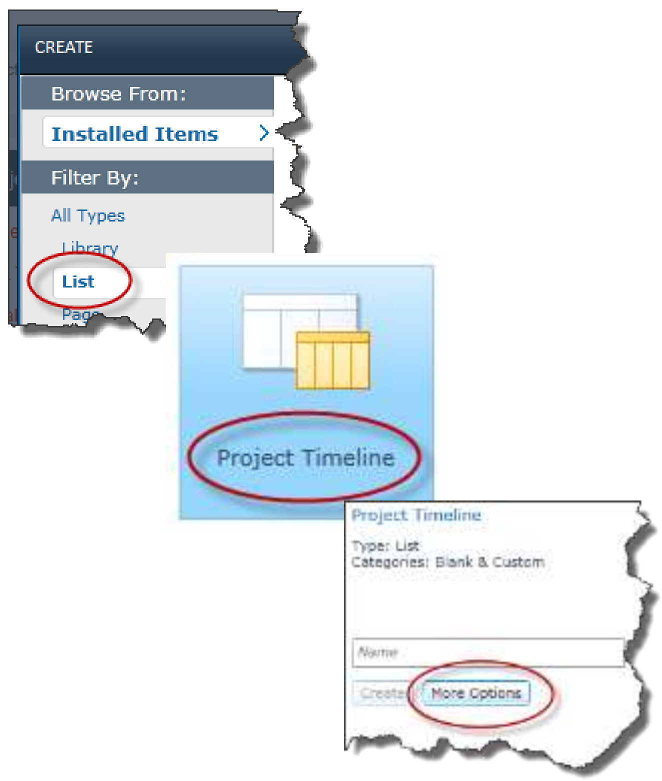
1. At the site level:

- Click **Site Actions** -> **More Options**



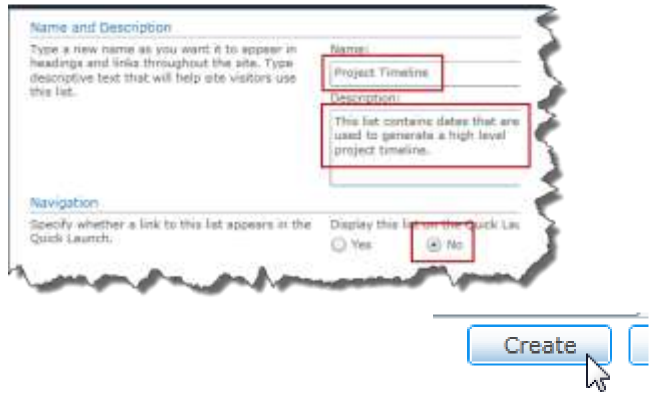
2. Go to:

- Filter By -> All Types -> **List**
- Select -> **Project Timeline**
- Click: **More Options**



3. Name the list

- List name: **Project Timeline**
- Description: **This list contains dates that are used to generate a high level project timeline.**
- Display this list on the Quick Launch? -> **No**
- Click: **Create**



4. Add items to the list

The phases are entered in reverse order to ensure they display properly on the timeline. It's counterintuitive, but it works.

The Chart Web Chart (see next section) uses the item ID to sort items on the chart, which creates limitations when sorting by date.

Earliest phase has the highest ID number and the latest phase has the lowest ID number (see ID # column project timeline list).

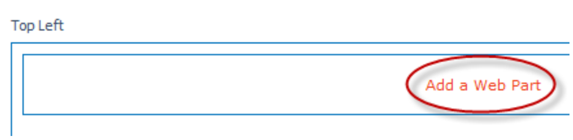
- Project Phase 1 = ID #4
- Project Phase 2 = ID #3
- Project Phase 3 = ID #2
- Project Phase 4 = ID #1

ID	Title	Start Date	End Date	Status
4	Initiate the Project	6/14/2012	9/5/2012	Completed
3	Plan, Requirements, and Design	8/16/2012	5/17/2013	Active
2	Develop and Test	5/1/2013	12/27/2013	Not Started
1	Implementation	11/4/2013	1/13/2014	Not Started

2: Create Chart Web Part

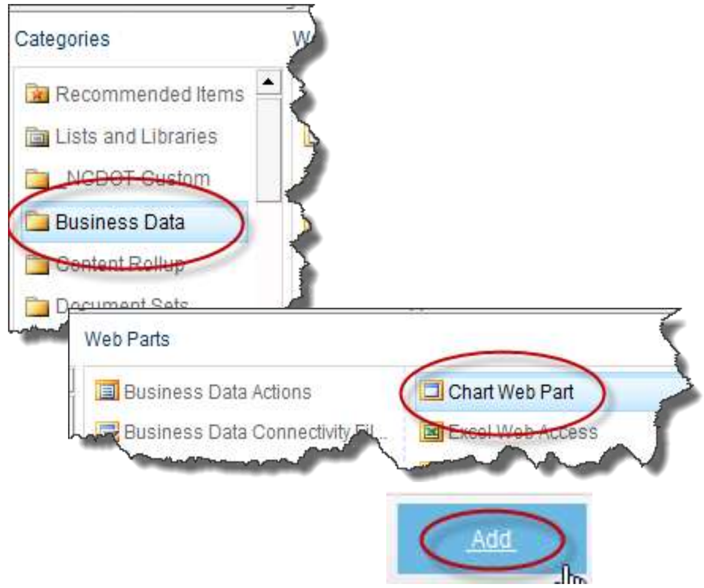
5. In Edit mode of the site page:

- In the **Top Left** zone
- Click: **Add a Web Part**

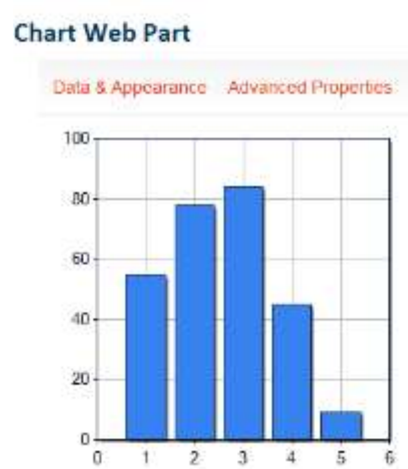


6. **Select the following:**

- Categories: **Business Data**
- Web Parts: **Chart Web Part**
- Click **Add**



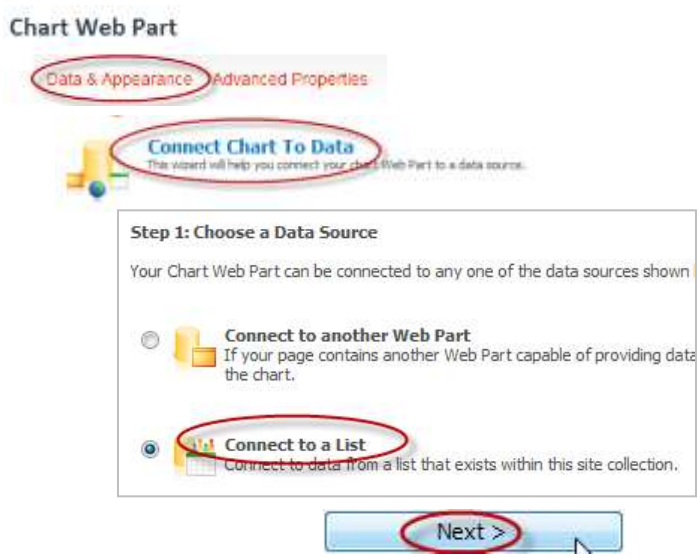
The chart web part has been added to the page, but it needs to be connected to the list. Move on to step 2 to connect the chart to the project timeline list.



3: Connect Chart to Data

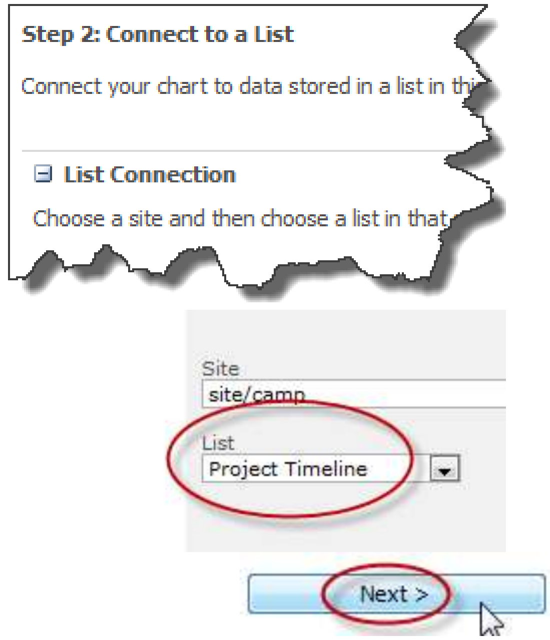
Step 1: Choose a Data Source

- Click: **Data & Appearance**
- Click: **Connect Chart to Data**
- Check: **Connect to a List**
- Click: **Next**



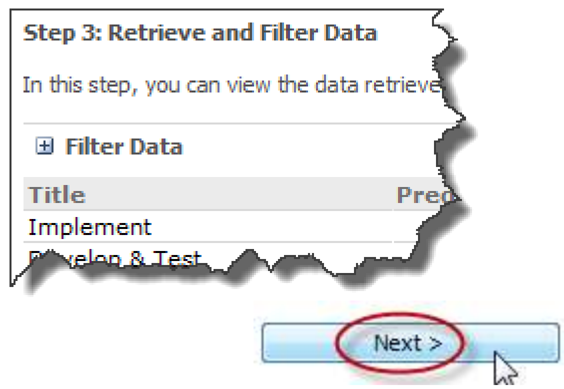
Step 2: Connect to a List

- The **Site** drop down list should default to the site you're currently in. If not, select the correct site from the drop down list.
- In the **List** drop down list, select **Project Timeline**
- Click: **Next**



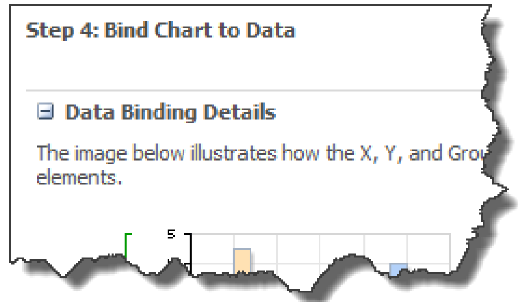
Step 3: Retrieve and Filter Data

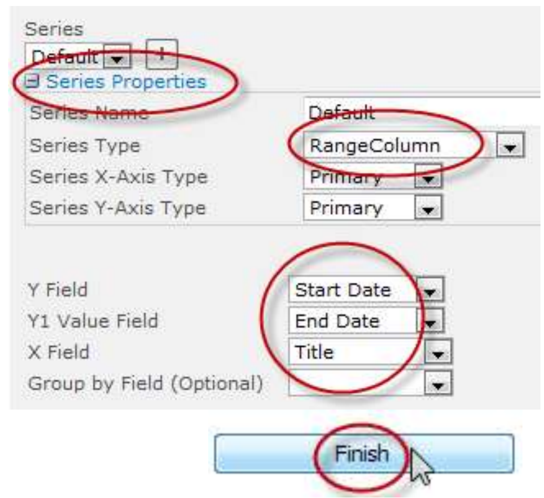
- No changes
- Click: **Next**



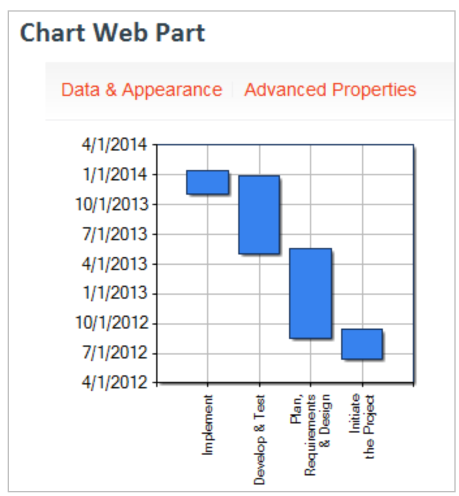
Step 4: Bind Chart to Data

- Expand options by clicking the plus **(+)** sign next to **Series Properties**
- Select Series Type: **RangeColumn**
- Select Y Field: **Start Date**
- Select Y1 Field: **End Date**
- Select X Field: **Title**
- Click: **Finish**





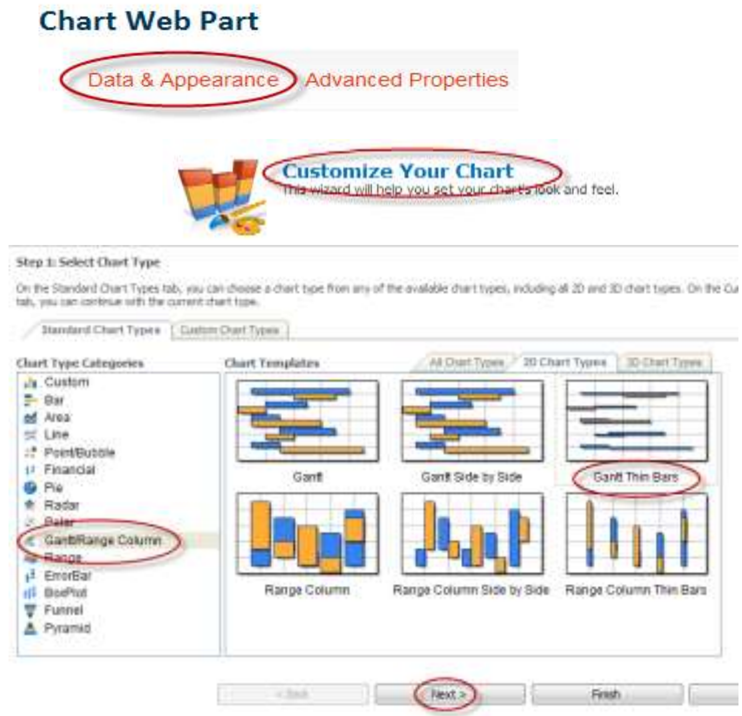
The list is now connected to the chart, but adjustments are needed. In step 3 we will apply minor design changes.



4: Customize Chart

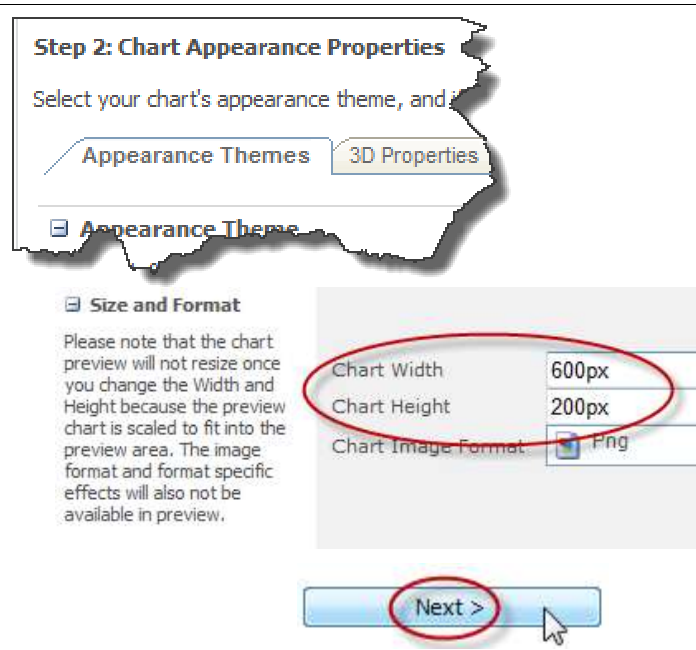
Step 1: Select Chart Type

- Click: **Data & Appearance**
- Click: **Customize Your Chart**
- Chart Type Categories, select: **Gantt/Range Column**
- Chart Templates, select: **Gantt Thin Bars**
- Click: **Next**



Step 2: Chart Appearance Properties

- **Appearance Themes** tab, change chart size:
  - Width: **600px**
  - Height: **200px**
  - Click: **Next**



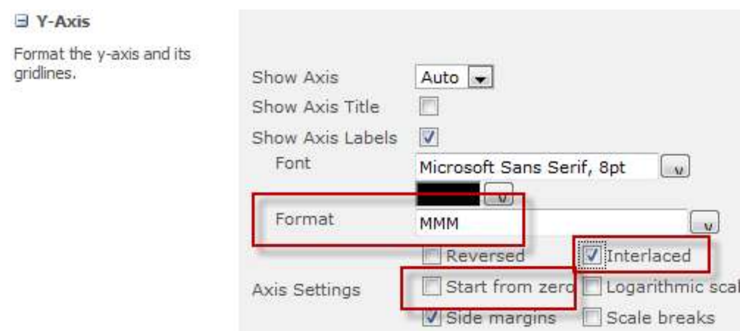
Step 3: Chart element properties

- Click the tab: **Axes and Grid Lines**
- Note: X-Axis does not require formatting. Proceed to Y-Axis format options.

Step 3: Chart element properties (continued)

Format Y-Axis

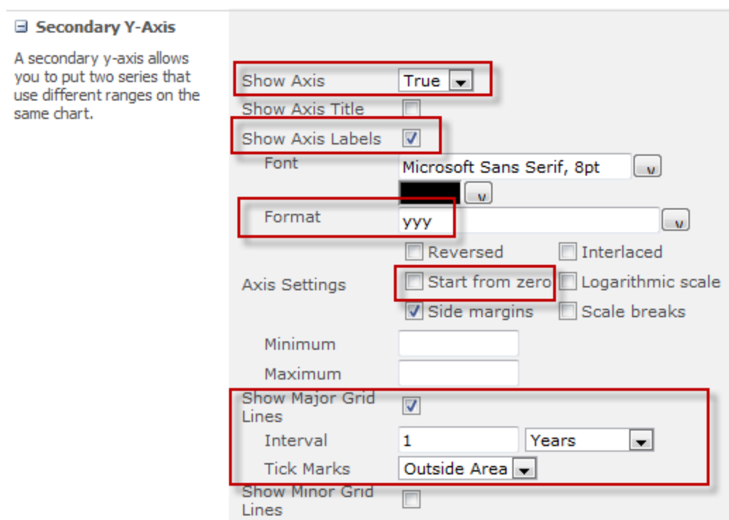
- Show Axis Labels:
  - Format (uppercase): **MMM**
- Axis Settings:
  - Start from zero: **Uncheck**
  - Interlaced: **Check**



Step 3: Chart element properties (continued)

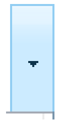
Format Secondary Y-Axis

- Click the plus **(+)** sign next to **Secondary Y-Axis**
- Show Axis, select: **True**
- Show Axis Labels: **Check**
  - Format (lowercase): **yyy**
- Axis Settings:
  - Start from zero: **Uncheck**
- Show Major Grid Lines: **Check**
  - Interval:
    - Enter: **1**
    - Select: **Years**
    - Tick Marks: **Outside Area**
- Click: **Finish**

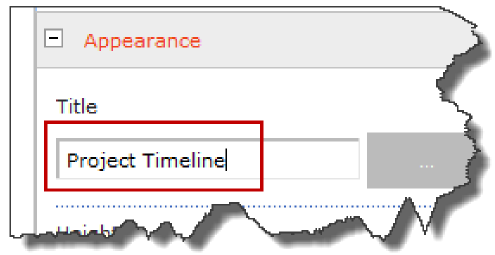


Change Chart Web Part Title

- Pull up the Web Part Menu by clicking the arrow located at the upper right corner of the Chart Web Part



- Select **Edit Web Part**
- Enter the new title: **Project Timeline**
- Click: **OK**



How the Project Timeline appears to users with Reader permissions